

Task

Create a customer-facing “What to Expect From Your Appointment” document or webpage.

This should be used before the sales appointment to help the customer understand the process and feel comfortable before we arrive.

Where This Should Be Used

Add this to:

Appointment confirmation email

Appointment confirmation text, if possible

Website as a page or downloadable PDF

Sales team follow-up materials

CSR appointment-setting process

Page / Document Title

What to Expect From Your Blues Brothers Roofing Appointment

Opening Copy

This is not a high-pressure sales appointment.

Our goal is to help you understand what is going on with your roof, explain your options clearly, and help you make a confident decision — whether you choose Blues Brothers Roofing or not.

Appointment Steps

1. Quick Introduction

We’ll introduce ourselves, confirm what prompted the visit, and explain what we’ll be doing during the appointment.

2. Walk-Around Inspection

We'll walk around the home and roof areas to assess what is going on.

During this step, we may:

Take photos

Ask a few simple questions

Look at key areas that affect roof performance

Document anything important that we find

3. Discovery Conversation

After the inspection, we'll ask a few questions to better understand what matters most to you.

This may include:

Your concerns

Your priorities

Your timeline

Your budget comfort level

Your style or material preferences

Past contractor experiences

Anything you want to avoid

The goal is to understand your needs before we recommend anything.

4. Clear Explanation of What We Found

We'll review what we found during the inspection in plain English.

When possible, we'll use photos so you can see what we see.

5. Options and Recommendations

If you would like to hear our recommendations, we'll explain your options clearly and help you understand what makes the most sense for your home.

We do not believe in one-size-fits-all recommendations.

6. Customized Quote

We'll provide a quote based on your home, your goals, and your preferences.

You can ask for the quote to be as simple or as detailed as you prefer.

7. Follow-Up at Your Preference

Before we leave, we'll set a follow-up plan that works for you.

That may be a call to answer questions, confirm your decision, or close your file if you decide not to move forward.

The goal is to respect your process, not chase or pressure you.

Closing Copy

A roof is a big decision. Our job is to make it a clearer one.

At Blues Brothers Roofing, we inspect, listen, explain your options, and build recommendations around your home and your priorities.

No pressure. No one-size-fits-all pitch.

Just a better way to choose your roof.

CTA / Contact Info

Questions before your appointment?

Call us at:

561-361-6378

Visit:

bluesbrotherscc.com

Short Email Version

Use this in the appointment confirmation email.

Subject

What to Expect From Your Roofing Appointment

Email Copy

Hi [Customer Name],

Thank you for scheduling your appointment with Blues Brothers Roofing.

Before we come out, we wanted to give you a quick idea of what to expect.

This is not a high-pressure sales appointment. Our goal is to inspect your roof, listen to your concerns, explain your options clearly, and help you make a confident decision.

During the appointment, we will walk around the home, take photos if needed, ask questions about your priorities and concerns, explain what we find, and provide a customized quote based on your home and goals.

At the end, we'll set a follow-up plan at your preference so we can answer questions, confirm your decision, or close your file if you decide not to move forward.

A roof is a big decision. We're here to help make it a clearer one.

Blues Brothers Roofing

561-361-6378

bluesbrotherscc.com

Short Text Message Version

Hi [Customer Name], this is Blues Brothers Roofing. Before your appointment, here's a quick overview of what to expect: we'll inspect, listen, explain your options, and provide a quote based on your home and priorities. No pressure, just a better way to choose your roof: [link]

Implementation Checklist

Create the "What to Expect From Your Appointment" page or PDF.

Add the page/PDF link to appointment confirmation emails.

Add the link to appointment confirmation texts if possible.

Add a CTA button from the homepage section created in Doc/Task 01.

Make sure salespeople understand and follow the same appointment flow.

Confirm phone number is **561-361-6378**.

Confirm website is **bluesbrotherscc.com**.
Proofread all spelling before publishing.